



2017

# Wild Apricot User Manual

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Cottonwood Tennis Club.

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# Introduction

## Terminology

Wild Apricot. An online club management system which provides us with a member *database* and a *website* to access and manage our club data.

Website. A set of related *web pages* on the World Wide Web that can be accessed by a *web browser*. We have about a dozen web pages in our Wild Apricot website.

URL/Web Address. The address a Web Browser (Firefox, Internet Explorer, Safari) needs to find each of our web pages. We usually start by giving the browser the address of our Home Page and then using the Menu to go to our other pages.

Log In/Out. To enter identifying data, such as a username or password, so as to access and use a database. Sign On/Out are synonyms.

Username. Wild Apricot uses your unique email address for your username,

Password. You create a unique password which you use with your username to log in.

Log In Icon. Click this icon  at the upper right of each page to log in.

## Finding Our Website's Home Page

The URL/Web Address for our Home Page is [cottonwoodtennisclub.wildapricot.org](http://cottonwoodtennisclub.wildapricot.org). After the trial period has ended, we will be able to re-use cottonwoodtennisclub.com as shorthand for our new Wild Apricot Home Page's address.

## To Log In or Not To Log

Most of the webpages on our website can be accessed *without logging in*. That allows prospective members, members of other clubs and so forth to learn about us. It also allows members to access commonly used data, such as ratings lists, without a Log In.

A log in is required to:

- See another member's contact and personal data.
- Make changes to your Member Profile.
- Register for Members-Only events.
- Access Member-Only Pages

### Menu Bar When Logged In

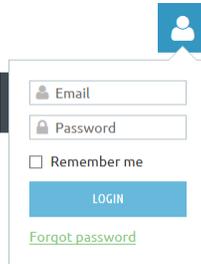
[HOME](#) [EVENTS](#) [RESULTS](#) [DIRECTORY](#) [CONTACT US](#) [ABOUT US](#) [JOIN US](#) [VOLUNTEER](#) [DOCUMENTS](#) [FORUMS](#)

### Menu Bar When Not Logged In

[HOME](#) [EVENTS](#) [RESULTS](#) [DIRECTORY](#) [CONTACT US](#) [ABOUT US](#) [JOIN US](#)

# Creating Your Password

To create your password, click on the log In icon . When you do so, you should see:



A login form overlay with a blue header containing a user icon. Below the header are two input fields: 'Email' and 'Password'. Underneath the 'Password' field is a checkbox labeled 'Remember me'. A blue 'LOGIN' button is positioned below the checkbox. At the bottom of the form is a green link labeled 'Forgot password'.

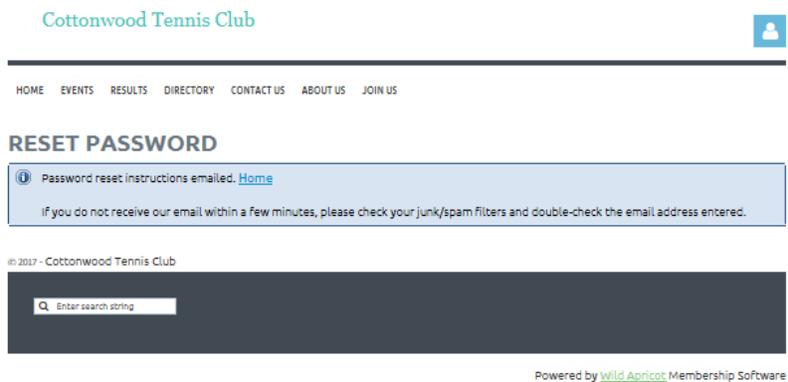
You may find your computer has auto-filled the email and address fields. It's best to clear both fields by putting the cursor in each one and deleting whatever is in it.

Once you have cleared the fields, press the [Forgot Password Link](#), which will take you to the Reset Password page.



The 'Reset Password' page for Cottonwood Tennis Club. It features a navigation bar with links: HOME, EVENTS, RESULTS, DIRECTORY, CONTACT US, ABOUT US, JOIN US. The main heading is 'RESET PASSWORD'. The form includes a 'Your email' field with the value 'rice.mike99@gmail.com', a 'Code' field with the value '8WLDXW6', and a CAPTCHA image showing the characters '8WLDXW6'. A blue 'SUBMIT' button is located below the CAPTCHA. At the bottom, there is a search bar and a footer that reads '© 2017 - Cottonwood Tennis Club' and 'Powered by Wild Apricot Membership Software'.

Enter your email address and the antispam code and press Submit.

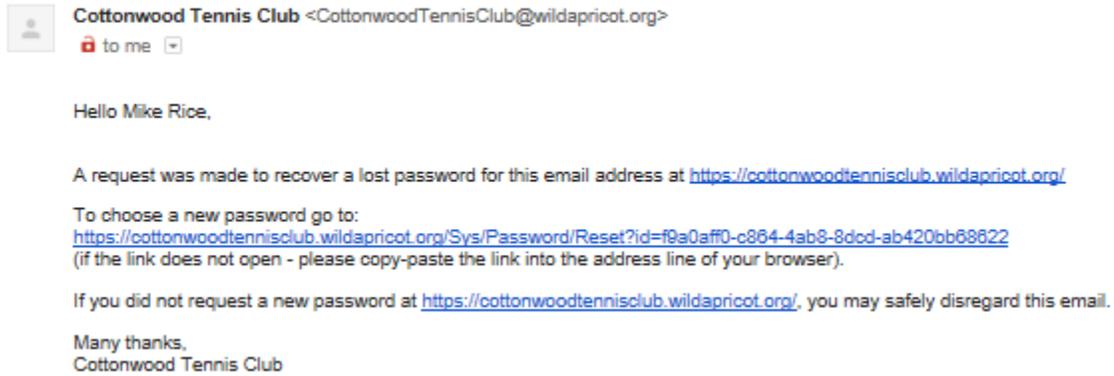


The 'Reset Password' page after submission. The main heading is 'RESET PASSWORD'. A blue message box contains the text: 'Password reset instructions emailed. [Home](#). If you do not receive our email within a few minutes, please check your junk/spam filters and double-check the email address entered.' Below the message box is a search bar and a footer that reads '© 2017 - Cottonwood Tennis Club' and 'Powered by Wild Apricot Membership Software'.

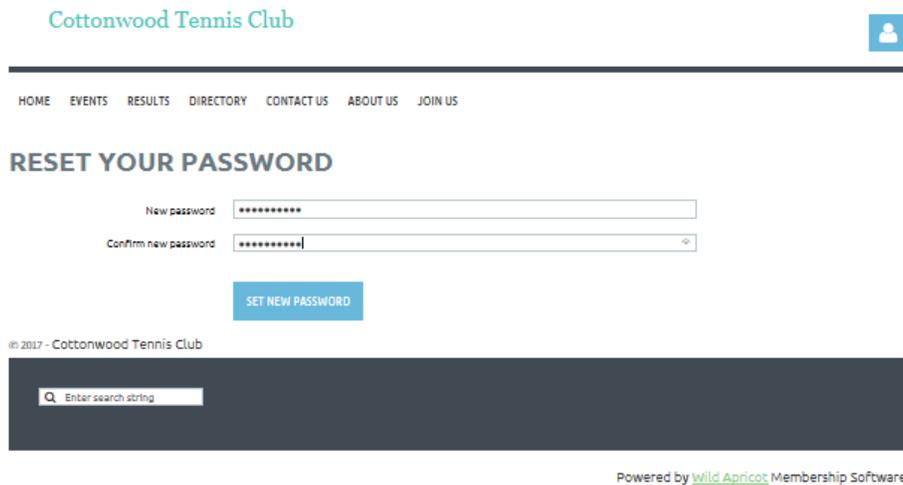
You should get a message that you were sent an email with password setup instructions. It should be in your Inbox. Check your SPAM folder if you don't see it.

The email will look like this:

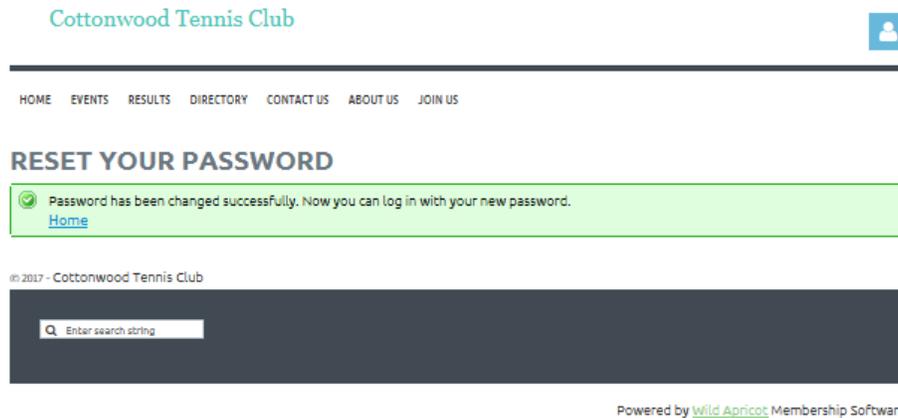
Choose a new password for your Cottonwood Tennis Club account Inbox x



Click on the link after “To choose a new password go to”. That will take you back to the Reset Password page where you enter the password you want twice.



Press the Set New Password button, and you should get a confirmation message.



Click the [Home](#) link, and it will take you back to the Home Page. You can now log in.

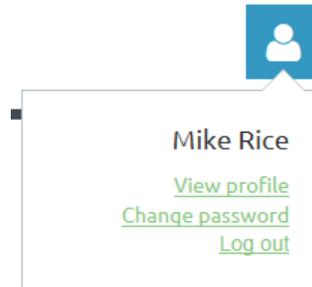
# Updating Your Profile

Your profile is on the *My Profile* web page which only you can access. You must be logged in to access it. From this web page, you can:

- Update the fields in your profile.
- Manage your privacy settings
- Create a photo album.

## Accessing Your Profile

Click on the log in icon and then click on the View Profile link:



You should see the following page with your member details.

### MY PROFILE

[EDIT PROFILE](#) [My directory profile](#)

[Profile](#) [Privacy](#) [Email subscriptions](#) [Member photo albums](#) [Invoices and payments](#)

#### MEMBERSHIP DETAILS

Membership level	<b>2017-2018 Membership - \$50.00 (USD)</b> <i>Subscription period: 1 year, on: April 1st No recurring payments Stop recurring payments to change level or renew manually.</i>
Membership status	<b>Active</b>
Member since	3 Apr 2017
Renewal due on	1 Apr 2018 <i>You can renew starting 2 Mar 2018</i>
Member ID	38364867
First name	Mike
Last name	Rice
Email	<a href="mailto:rice.mike99@gmail.com">rice.mike99@gmail.com</a>
HOA	
Home Phone	883-1236
Cell Phone	<a href="tel:541-326-7001">541-326-7001</a>
Gender	M
Group participation	
Rating	White
Address	25227 S. Saddletree Dr.
Spouse	Mary Ann
Fake EM	
Club Resume	January 2017-present. Webmaster and Wild Apricot Site Administrator.

## Member Detail Fields

Most of the detail fields should be self-explanatory, but here are the descriptions of the fields that aren't.

- **Membership Level (Ignore).** Wild Apricots requires at least one level. We only have one level. Everyone has the same level.
- **Member Since.** For members who joined before April 2017, this is the date we moved your member record to Wild Apricot. For those who joined after April 2017, this is the date your membership was activated.
- **Member ID (Totally ignore).** This is an internal field used by Wild Apricot.
- **HOA.** If you are in CWPV, this field is blank. Otherwise, it is IOTC or SLCC.
- **Fake EM.** If a couple shares an email address, we added an "x" to one address to make it unique and put an "\*" in this field to identify the fake one.
- **Club Resume.** You can use this field to enter you club volunteer experiences, accomplishments and so forth.

## Editing Your Member Detail Fields

To can change your profile details except for fields like ratings. To do so, press the Edit Profile button. Your My Profile page should now look like this:

**MY PROFILE**

[SAVE](#) [CANCEL](#)

[Profile](#) [Privacy](#) [Email subscriptions](#)

\* Mandatory fields

Member ID 38364867 This field is generated automatically and cannot be changed

First name

Last name

Email

HOA

Please select an HOA code if not Cottonwood/Palo Verde.

**Home Phone**

Cell Phone

Gender

Group participation

Rating

Address

Spouse

Fake EM

Club Resume

Use this field to list your volunteer positions with the club and other contributions. Add relevant non-club experience. Write anything you want other members to know.

After you are finished, press SAVE or CANCEL to return to the previous page.

## Creating a Club Resume

The Club Resume detail field is a place where you can list your club volunteer and other contributions as well as your club tennis accomplishments. You can write anything you think other club members would like to know about you. Here is an example:

Club Resume

Volunteering  
2015 - Present - League Coordinator

Tournaments  
2016 Bradshaw - finished 2nd

Ratings  
2012-Advanced from Black to Blue  
2005-Advanced from Black to Blue

*Use this field to list your volunteer positions with the club and other contributions. Add relevant non-club experience. Write anything you want other members. to know.*

## Creating a Club Photo

Club Photo is a field in your Profile, just like the Club Resume or any other field. You can make it a head shot, avatar or anything else.

1. View your profile.
2. Press the Edit button.
3. Locate the Club Photo.
4. Press the Browse button.
5. Locate your image file.
6. Press Open.
7. Press Save.

If you create one, here is how it will look in a directory search:

Search:  Found: 2

Name	Rating	Gender	Club Photo
<a href="#">Rice, Mary Ann</a>	Blue	F	
<a href="#">Rice, Mike</a>	White	M	

You should see the photos in your album now.

## Managing Your Privacy Settings

When a non-member, or a member not logged in, performs a directory search and views a member's profile, they can only see what would appear in a ratings list. Whereas a logged in member will see all the member's profile detail fields.

HOME   EVENTS   RESULTS   **DIRECTORY**   CONTACT US   ABOUT US   JOIN US

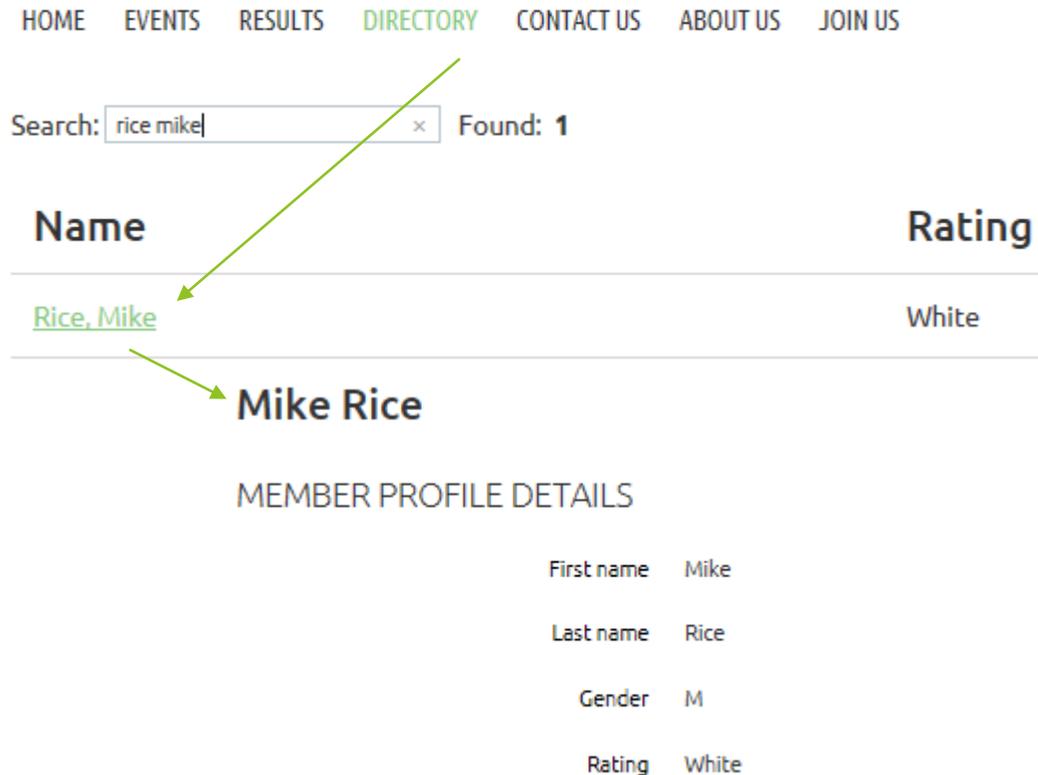
Search:  × Found: 1

Name	Rating
<a href="#">Rice, Mike</a>	White

**Mike Rice**

MEMBER PROFILE DETAILS

First name	Mike
Last name	Rice
Gender	M
Rating	White



Members can modify the default privacy settings for their profile. For example, suppose you want to let anyone see your Photos and your Club Resume, but you don't want anyone to see your Home Phone (don't worry if my example makes no sense).

1. Go to your My Profile Page.
2. Press the Privacy link.
3. Press Edit Profile.
4. Click Anybody by Photo Album.
5. Click Anybody by Club Resume.
6. Click No Access by Home Phone.
7. Click Save or Cancel.

# MY PROFILE

[SAVE](#) [CANCEL](#)

[Profile](#) [Privacy](#) [Email subscriptions](#)

Show profile to others

## DETAILS TO SHOW

(in member directories, forum and blog posts)

	 Anybody	 Members	 No access
 Photo album	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
 Send message form	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
 Membership level	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Member ID	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
First name	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Last name	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Email	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
HOA	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Home Phone	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Cell Phone	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Gender	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Group participation	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Rating	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Address	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Spouse	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Fake EM	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Club Resume	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

# Member Directory

Press the Directory menu item to open the Member Directory. From it, you can perform a simple search or an advanced search.

## Simple Search

Just begin typing a name in the Search box. The system will return narrower and narrower results the more you type. Click on a name to open the member's profile.

[HOME](#) [EVENTS](#) [RESULTS](#) [DIRECTORY](#) [CONTACT US](#) [ABOUT US](#) [JOIN US](#) [VOLUNTEER](#) [DOCUMENTS](#) [FORUMS](#)

You must [log in](#) to see other member's personal and contact information.

[Advanced search...](#)

Search:  Found: 3

Name	Rating	Gender
<a href="#">Allen, Maurice</a>	Green	M
<a href="#">Rice, Mary Ann</a>	Blue	F
<a href="#">Rice, Mike</a>	White	M

## Advanced Search

After you press the Advanced Search link, all the member detail fields will appear along with two search criteria boxes. To search for all Men's Green players:

1. Click on Advanced Search
2. Select "Is" and "M" by Gender
3. Select "is" and "Green" by rating

Gender	<input type="text" value="is"/>	<input type="text" value="M"/>
Group participation	<input type="text"/>	<input type="checkbox"/> Board Members
Rating	<input type="text" value="is"/>	<input type="text" value="Green"/>
Address	<input type="text"/>	<input type="text"/>
Spouse	<input type="text"/>	<input type="text"/>
Fake EM	<input type="text"/>	<input type="text"/>
Club Resume	<input type="text"/>	<input type="text"/>

or [Go to simple search](#)

## Member Ratings Lists

There are two ways to view a ratings list:

- Advanced Directory Search
- Men's or Women's Ratings List PDF

The directory search will always be the most recent, as it comes directly from the member database. However, the advanced search can only produce a single gender/color list. It can't for example, list those eligible for Wednesday League.

The PDFs, by comparison, are created from the database once a month. So there are not quite as current. However, they are compact (one page per gender with all ratings) and convenient (QuickLinks and Bulletin Board).

# EVENTS

## Events Calendar

### Upcoming Events Calendar

The Home Page contains an Upcoming Events Calendar. It is updated automatically by Wild Apricot to show the next 5 events. To go to that event, just click on it's link.



[Clay Court at IronOaks Tennis Club - Open](#)  
12 Jun 2017 | IronOaks Tennis Club

[Pancake Breakfast @ IronOaks - Open](#)  
1 Jul 2017 | IronOaks Tennis Club

[SUMMER Clay Court @ IronOaks - Mixed - Open](#)  
17 Jul 2017 | IronOaks Tennis Club

[IronOaks Open Tournament](#)  
14 Oct 2017 | IronOaks Tennis Club

[Rainbow Classic Tournament](#)  
20 Oct 2017 | Cottonwood Tennis Club

## Full Calendar

If you want to see more events, click on the Events button.

**YEAR: 2017**

[Switch to List View](#)

WEEK	MONTH	YEAR	< PREVIOUS YEAR	TODAY	NEXT YEAR >
<a href="#">January 2017</a>		<a href="#">February</a>		<a href="#">March</a>	
<a href="#">April</a>		<a href="#">May</a> May 17 • <a href="#">Introduction to Wild Apricot</a>		<a href="#">June</a> Jun 12 • <a href="#">Clay Court at IronOaks Tennis Club - Open</a>	
<a href="#">July</a> Jul 01 • <a href="#">Pancake Breakfast @ IronOaks - Open</a> Jul 17 • <a href="#">SUMMER Clay Court @ IronOaks - Mixed - Open</a>		<a href="#">August</a>		<a href="#">September</a>	
<a href="#">October</a> Oct 14 • <a href="#">IronOaks Open Tournament</a> Oct 20 • <a href="#">Rainbow Classic Tournament</a> Oct 25 • <a href="#">Board Meeting</a> Oct 28 • <a href="#">Sunbird vs. Cottonwood Social</a> Oct 28 • <a href="#">Cottonwood vs. Sun Lakes CC Social</a>		<a href="#">November</a> Nov 05 • <a href="#">Bradshaw Tournament</a> Nov 13 • <a href="#">Welcome Back Dinner and Membership Meeting</a> Nov 15 • <a href="#">Board Meeting</a> Nov 18 • <a href="#">Leisurewood vs. Cottonwood Social</a>		<a href="#">December</a> Dec 03 • <a href="#">Cottonwood Holiday Dinner/Dance</a> Dec 06 • <a href="#">Triple "T" Tennis Tournament</a> Dec 16 • <a href="#">Cottonwood vs. Sunbird/Springfield Social</a> Dec 31 • <a href="#">IronOaks - New Year's Eve Party - Open</a>	

By default, you see the Year view. Notice that to see events in 2018, you must click Next Year. There are buttons for other time spans and a link to the List View.

The Month View is color coded:

- Orange - CTC tennis events
- Red - Non-CTC tennis events
- Blue - Social (non-tennis) events
- Green - Meetings

## Registering for an Event Online

You can only register for event online that has a Register button displayed on the Event Page. I have created a Test event so you can practice registering.

To register for a Members-Only event you must:

- Be logged in, or
- You must log in when prompted when you try to register.

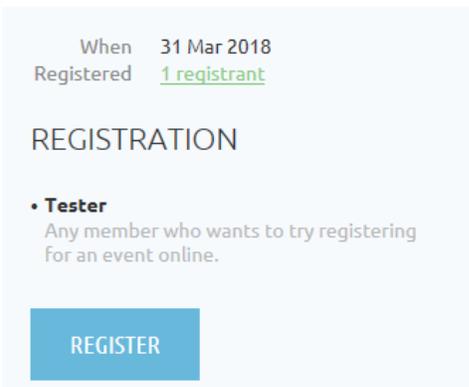
To register for an open event *you should log in*. If are logged in when you register, Wild Apricot will populate the registration form with your member details. If you are not logged in, and you make a typo entering an email, Wild Apricot you are someone from another club, and it will create a new record for you in the member database.

To illustrate these concepts, I have created a test event that *you can try!* The event is scheduled for March 31, 2018.

To find the Event's page:

1. Press the Events menu item.
2. Press the Next Year button.
3. Find this event in March, and press on its link.
4. This should display the Event page.

### Test Registration - Give it a try!



When 31 Mar 2018  
Registered [1 registrant](#)

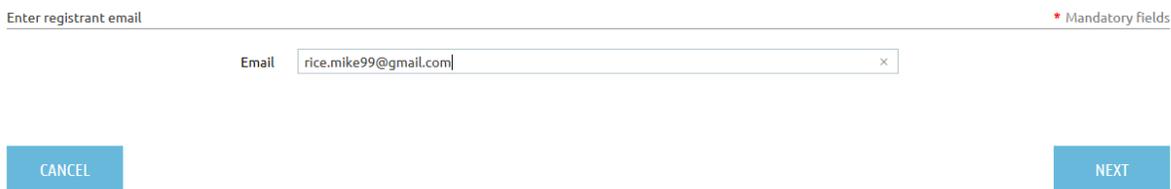
#### REGISTRATION

- **Tester**  
Any member who wants to try registering for an event online.

**REGISTER**

This events allows members to try out registering for an event.

Press the Register button. If you are logged in, the Email field will have your email. If you are not logged in, you must enter your email address.



Enter registrant email \* Mandatory fields

Email

**CANCEL** **NEXT**

Press Next (or Cancel), and you will see the registration form.

I added 3 extra fields to form just so you can try them out.

- Your ratings goal for this year (up/down/no change). Pick one.
- Your entrée choice. Pick one.
- The number of guests you will be bringing. Enter a number.

Enter registration information \* Mandatory fields

First name

Last name

Email

Rating Goal This Year

Move Up

Move Down

No Change

*Select a goal just to try it out.*

Menu Choice [Clear selection](#)

Steak

Chicken

Salmon

*Select one to try out radio buttons.*

PUBLIC LIST OF EVENT REGISTRANTS

Include name in list of event registrants

*You may wish to exclude your name for privacy or security reasons*

Guests

Additional guests

Press the Next Button to Review your registration before confirming.

**Review and confirm**

Event Test Registration - Give it a try!

31 Mar 2018

Registration Tester

type

Guest (1)

Press Confirm. You will get a confirming message and email.

## Cancellation

To cancel a reservation, you must email the Event Administrator.

## Wild Apricot Proficiency Test

1. I must be logged in to see anything useful on the website. True \_\_\_ False \_\_\_
2. I can find ratings lists in the QuickLinks section. True \_\_\_ False \_\_\_
3. I can find a User Manual in the QuickLinks section. True \_\_\_ False \_\_\_
4. I can find Help videos in the QuickLinks section. True \_\_\_ False \_\_\_
5. I must be logged in to use QuickLinks. True \_\_\_ False \_\_\_
6. I must be logged in to view Club Photo Albums. True \_\_\_ False \_\_\_
7. I must be logged in to use the Online Directory. True \_\_\_ False \_\_\_
8. I must be logged in to see members' ratings. True \_\_\_ False \_\_\_
9. I must be logged in to see members' phones/address. True \_\_\_ False \_\_\_
10. I must be logged in to view Club Documents (like minutes). True \_\_\_ False \_\_\_
11. I must be logged in to participate in a Discussion Forum. True \_\_\_ False \_\_\_
12. I must be logged in to use the Events Calendar. True \_\_\_ False \_\_\_
13. I must be logged in to Register online for a club event. True \_\_\_ False \_\_\_
14. There are menu items not visible unless I log in. True \_\_\_ False \_\_\_
15. My email address is my username, and it must be unique. True \_\_\_ False \_\_\_
16. I need a username and password to log in. True \_\_\_ False \_\_\_
17. I can create or change my own password. True \_\_\_ False \_\_\_
18. I can update the Member Details in My Profile. True \_\_\_ False \_\_\_
19. I can update my Member Details without being logged in. True \_\_\_ False \_\_\_
20. I can control what appears in the online directory about me. True \_\_\_ False \_\_\_
21. I can add photos to my profile. True \_\_\_ False \_\_\_
22. I can create a Club Resume in my profile. True \_\_\_ False \_\_\_
23. I can change my rating in my profile. True \_\_\_ False \_\_\_
24. Every member must use the new website. True \_\_\_ False \_\_\_
25. Non-members can't access the website. True \_\_\_ False \_\_\_

Score: \_\_\_\_/25

Answer Key: 1F. 2T. 3T. 4T. 5F. 6F. 7F. 8F. 9T. 10T. 11T. 12F. 13T. 14T. 15T. 16T. 17T. 18T. 19F. 20T. 21T. 22T. 23F. 24F. 25F.

I certify that this member is proficient in the use of Wild Apricot.

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Wild Apricot Guide Name

Date